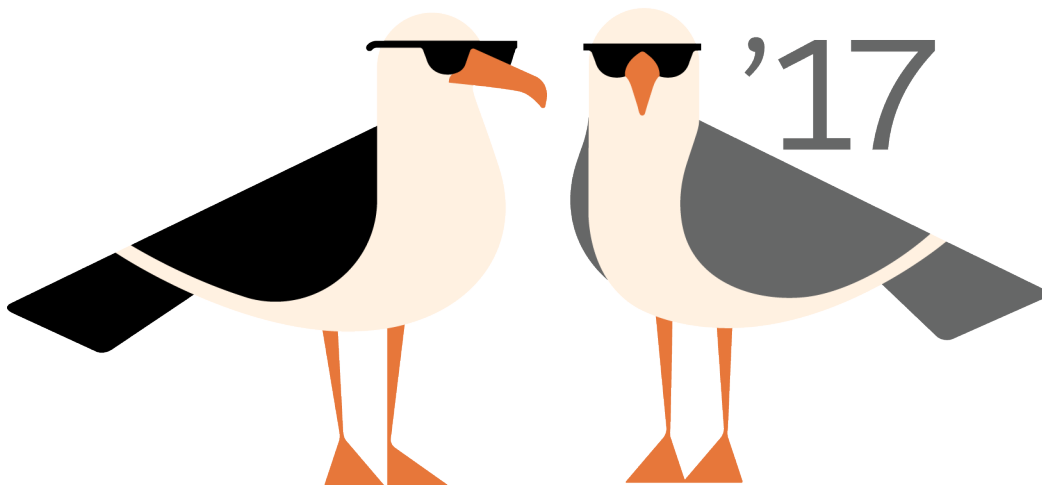




Salesforce Classic Mobile User Guide for BlackBerry

Version 40.0, Summer '17



CONTENTS

Chapter 1: What is Salesforce Mobile Classic?	1
What is the free, restricted version of Salesforce Mobile Classic?	1
About This Guide	2
Salesforce Mobile Classic Requirements	2
Device Requirements	3
Wireless Requirements	3
Additional Resources	3
Acknowledgements	4
Chapter 2: Getting Started	5
Installing Salesforce Mobile Classic	5
Setting Your Passcode	5
Accessing the Application	6
Navigating	6
Using the Application Menu	7
Your Mobile Data	7
Mobile Tabs	8
Mobile Objects	8
Mobile Records	9
Displaying Data	9
Displaying Visualforce and Web Tabs	9
Selecting Views	10
Chapter 3: Working with Records	11
Managing Records	11
Viewing Records	12
Opening Records from Email Messages	12
Viewing Related Lists	12
Editing Records	13
Creating Records	13
Deleting Records	13
Cloning Records	14
Changing the Record Owner	14
Using Notes	14
Searching for Records	14
Search Box	15
Advanced Search	16
Search Detail Pane	16
Using BlackBerry Features with Salesforce Mobile Classic	17

Contents

Placing Calls	17
Sending Email	18
Mapping an Address	18
Importing Records	19
Exporting Records	20
Chapter 4: Working with Standard Objects	23
Converting Leads	23
Managing Activities	23
Viewing Tasks	24
Viewing Events	24
Activity Alerts	25
Open Activities	25
Activity History	25
Using Cases and Solutions	26
Displaying Cases and Solutions	26
Case Assignment Rules	26
Solving Cases	26
Case Comments and History	27
Using Products and Price Books	27
Adding Products to Opportunities	27
Changing the Price Book for a Product	28
Chapter 5: Working with Dashboards and Reports	29
Working with Dashboards	29
Displaying Dashboards	29
Refreshing Dashboards	30
Running Reports	30
Reports Home	30
Searching for Reports	31
Running Reports	31
Viewing Reports	31
Refreshing Reports	32
Clearing Report Data	32
Chapter 6: Using Salesforce CRM Content in Salesforce Mobile Classic	33
Viewing Content Details	33
Previewing Content	33
Delivering Content	34
Chapter 7: Customizing Salesforce Mobile Classic	35
Managing Mobile Custom Views	35
Creating Custom Views	35
Editing Custom Views	36
Deleting Custom Views	36

Contents

Editing Object Preferences	37
Task Preferences	37
Event Preferences	38
Account Preferences	38
Contact Preferences	38
Lead Preferences	39
Opportunity, Price Book, Product, Solution, and Custom Object Preferences	39
Case Preferences	39
Call and Email Preferences	39
Chapter 8: Managing the Application	41
The System Information Page	41
The System Information Menu	42
Refreshing Data	42
Upgrading Salesforce Mobile Classic	42
Upgrading the BlackBerry Operating System	43
Removing Salesforce Data from Your Device	43
Uninstalling Salesforce Mobile Classic	44
Chapter 9: Frequently Asked Questions	45
Index	49

CHAPTER 1 What is Salesforce Mobile Classic?

Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

Salesforce Mobile Classic gives you mobile access to your Salesforce data, tasks and calendar, and integrates the data with your email. With Salesforce Mobile Classic installed on your BlackBerry® smartphone, you can stay connected to your data when you are not sitting at your desk and even when your device is not connected to the wireless network.

Salesforce Mobile Classic downloads relevant data for standard Salesforce objects—such as accounts, contacts, opportunities, tasks, events, and leads—and for custom objects. You can edit existing data records, create new ones, and delete records you no longer need. Additional Salesforce Mobile Classic features let you search for specific Salesforce records and add them to your device, review activity history, and log phone calls and emails directly to Salesforce. Any updates you make to data from your device will be transferred to Salesforce.

Your Salesforce Mobile Classic data is defined by a mobile configuration created by your administrator. He or she identifies which objects, records, and specific fields are relevant to your daily work needs. This allows a subset of all your Salesforce data to be delivered to your device. Remember, you can also search for and retrieve individual records that are not automatically downloaded to your device.

IN THIS SECTION:

1. [What is the free, restricted version of Salesforce Mobile Classic?](#)
2. [About This Guide](#)
3. [Salesforce Mobile Classic Requirements](#)
4. [Additional Resources](#)
5. [Acknowledgements](#)

What is the free, restricted version of Salesforce Mobile Classic?

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Any Salesforce user who doesn't have a mobile license can download a free, restricted version of Salesforce Mobile Classic, which they can use to view, create, edit, and delete only accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. They can also access their dashboards.

With the free version, you can view, create, edit, and delete only accounts, assets, contacts, leads, opportunities, events, tasks, cases, and solutions. You can also access your dashboards.

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17


Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

In the free version of Salesforce Mobile Classic, only records you recently accessed in Salesforce automatically synchronize to your device. However, you can search for and download records that are not automatically delivered to your device. Items you download from Salesforce become a permanent part of your mobile data set. In addition to recently accessed records, the default configuration synchronizes activities closed in the past five days and open activities due in the next 30 days.

 **Note:** Assets aren't available as a tab in the Salesforce Mobile Classic app but display as a related list for accounts, cases, and contacts.

About This Guide


 **Important:** As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce 1 app, the new Salesforce mobile experience.

The *Salesforce Mobile Classic User Guide for BlackBerry* is a reference for Salesforce users who want to access their data from a BlackBerry smartphone. Before reading this guide, you should already be familiar with your mobile device. You need to know how to use the trackwheel or trackball, enter and edit data, move through menus, and back up to previous pages.

This guide includes the following information:

- [What is Salesforce Mobile Classic?](#): Salesforce Mobile Classic introduction, documentation, requirements, and additional resources.
- [Getting Started](#): The installation process, setting your mobile passcode, logging in, navigating, and displaying data.
- [Working with Records](#): How to work with records on the mobile device, including managing records, searching, and using Salesforce Mobile Classic with BlackBerry features.
- [Working with Standard Objects](#): How to work with standard objects on the mobile device, including activities, cases and solutions, and products and price books.
- [Customizing Salesforce Mobile Classic](#): Options for customizing Salesforce Mobile Classic, such as creating custom views and configuring object preferences.
- [Working with Dashboards and Reports](#): Steps for displaying dashboards and running reports in Salesforce Mobile Classic.
- [Managing the Application](#): How to access the system information, refresh the data on your device, erase the Salesforce data from your device, upgrade the mobile application, and uninstall the mobile application.
- [Frequently Asked Questions](#): A set of frequently-asked questions regarding troubleshooting Salesforce Mobile Classic.

Salesforce Mobile Classic Requirements

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Salesforce Mobile Classic is a client application you download and run on your BlackBerry smartphone. In order to use Salesforce Mobile Classic on your wireless device, you must meet certain requirements.

IN THIS SECTION:

[Device Requirements](#)

[Wireless Requirements](#)

Device Requirements

The Salesforce Mobile Classic app can run on BlackBerry operating system versions 4.3 through 7.0. [Upgrading to the latest version of the BlackBerry operating system](#) can improve device performance. At a minimum, 2 to 3 MB of free memory should be available on the device. The mobile client application is supported by these BlackBerry smartphones:

- BlackBerry 8100 Series (Pearl)
- BlackBerry 8300 Series (Curve)
- BlackBerry 8500 Series (Curve)
- BlackBerry 8800 Series
- BlackBerry 8900 Series (Javelin)
- BlackBerry 9000 Series (Bold)
- BlackBerry 9300 Series (Curve 3G)
- BlackBerry 9500 Series (Storm)
- BlackBerry 9600 Series (Tour)
- BlackBerry 9700 Series (Bold)
- BlackBerry 9800 Series (Torch)



Note:

- Even if your device meets the minimum operating system requirement, you can improve its performance by upgrading to the latest supported version of the operating system offered by your mobile carrier.
- Mobile users running versions 4.0 - 4.3 of the BlackBerry operating system can still download and install the Salesforce Mobile Classic app; however, the mobile server will detect the older operating system and send version 11.6 of Salesforce Mobile Classic, which was the last release that supported BlackBerry operating system versions 4.0 - 4.3. Users on version 11.6 of Salesforce Mobile Classic can't use any of the new features included in the current release or future releases.
- Starting in Winter '09, Salesforce Mobile Classic no longer officially supports the BlackBerry 8700 series, although the mobile app may continue to run on those device models.
- BlackBerry touchscreen devices use the same Salesforce Mobile Classic app as other BlackBerry devices, so some aspects of Salesforce Mobile Classic aren't optimized for the touchscreen interface.

Wireless Requirements

- Salesforce Mobile Classic relies on the wireless signal received by your device to connect to Salesforce; however, you can continue working on your local data even when you lose connectivity to your wireless network.
- Wireless devices must be within range of a transmission tower or WiFi connection to receive data updates and transmit your changes back to Salesforce. The signal icon in the upper right corner of your screen shows the current signal strength. Your device may receive data when it has a low signal, but your Salesforce data synchronizes best with a higher signal quality.

Additional Resources



Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.


Refer to the following documentation for additional information:

- BlackBerry Guides: Refer to the product guide that came with your device, or visit the [BlackBerry](#) website to find out more about BlackBerry smartphones.
- *Salesforce Mobile Classic Implementation Guide*: Salesforce administrators should consult this valuable reference tool. It describes how to successfully implement Salesforce Mobile Classic and deploy the mobile solution to BlackBerry users.

Acknowledgements

This product includes [TinyLine](#) software developed by Andrew Girow.

CHAPTER 2 Getting Started

 **Important:** As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

To get started with Salesforce Mobile Classic, you first need to download the application and then activate your Salesforce account. Before you start working with the mobile application, you should understand how to navigate around Salesforce Mobile Classic and display your data.

IN THIS SECTION:

1. [Installing Salesforce Mobile Classic](#)
2. [Setting Your Passcode](#)
3. [Accessing the Application](#)
4. [Navigating](#)
5. [Using the Application Menu](#)
6. [Your Mobile Data](#)
7. [Displaying Data](#)
8. [Displaying Visualforce and Web Tabs](#)
9. [Selecting Views](#)

EDITIONS


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Mobile app not available for orgs created in Winter '17 or later


Installing Salesforce Mobile Classic

 **Note:** The BlackBerry World is the preferred place for downloading the Salesforce Mobile Classic app because users are automatically notified as upgrades become available. However, some BlackBerry administrators restrict users from downloading and using the BlackBerry World on their devices. BlackBerry users can install Salesforce Mobile Classic over-the-air directly from Salesforce if they are unable to access BlackBerry World. To download Salesforce Mobile Classic over-the-air, open your Web browser and navigate to the following URL: `m.salesforce.com/bb`.

Depending on your organization's setup, you might need to [set up a passcode](#) before accessing the application.

Setting Your Passcode

For security, your Salesforce Mobile Classic session times out after ten minutes of inactivity. You must use a passcode — which is different than your Salesforce password — to access the mobile application after it locks. You are prompted to set up this passcode when you log in to Salesforce Mobile Classic for the first time.

 **Note:** The default timeout value is ten minutes. Your administrator can change the timeout value to a different time interval or remove it so that the application never locks.

To set up your passcode:

1. [Install](#) Salesforce Mobile Classic.

After your Salesforce records download to your device, you are prompted to create your passcode.

2. Click **OK**.
3. Enter your passcode, then click **OK**. The passcode can be between 5 and 32 characters. Do not include any spaces.
4. Enter your passcode again for confirmation, then click **OK**.

Notes about Passcodes

- Your passcode never expires; however, if you or your administrator choose to [erase the Salesforce data](#) on your device, you are prompted to create a new passcode after re-activating your Salesforce Mobile Classic account.
- In cases where you incorrectly type your passcode, you have ten attempts to enter the correct passcode before you are prompted to change it.
- If you forget your passcode, click **Deactivate** in the passcode popup window. The mobile application erases the Salesforce data on your device. After you enter your Salesforce username and password to reactivate your mobile account and download data, you are prompted to create a new passcode.

Accessing the Application

The icon for Salesforce Mobile Classic sits on the home page of your BlackBerry smartphone or inside your Applications folder.

1. Highlight the Salesforce Mobile Classic icon and click the trackwheel or trackball.


If your administrator disabled the mobile session timeout setting, the application's home page displays. If not, you are prompted to enter your passcode.

2. Enter the [passcode](#) you set up the first time you logged in to Salesforce Mobile Classic.

3. Click **OK** to view the home page.

Depending on your organization setup, the application might lock after a certain period of inactivity. Simply enter your passcode to return to the page you last visited.

You can hide Salesforce Mobile Classic simply by accessing other programs or features on your device while Salesforce Mobile Classic is open, or by using the **Hide** option on the main menu. To close and lock the application, open the menu and select **Log Out**.

 **Note:** If your Salesforce administrator configured your settings so that your mobile session never times out, **Log Out** is not available.

Navigating

If you are familiar with your BlackBerry smartphone, you will find it easy to navigate in Salesforce Mobile Classic. Here are guidelines for getting around in the application:

- Salesforce Mobile Classic displays your Salesforce tabs in a horizontal row across the screen.
- Salesforce Mobile Classic opens to the Home tab, which contains a list of items you recently accessed in the mobile application.

- Roll the trackwheel or trackball to move the cursor and highlight items on the screen. Trackwheel devices scroll up and down; trackball devices scroll left, right, up, and down. If you are unsure how to use the trackwheel or trackball, refer to the BlackBerry user guide that came with your phone.
- With a trackwheel device, click the trackwheel to select an item or open the application's menu. With a trackball device, click the trackball to select an item, and press the Menu key to open the application's menu.
- Like other BlackBerry applications, Salesforce Mobile Classic has a [main menu](#). The options on the menu are context-sensitive, which means that the options change depending on the type of item you select before opening the menu.
- Press the Escape button or Escape key to exit a screen, cancel an action, or go back one page. On trackwheel devices, the Escape button is located on the side of the phone. On trackball devices, the Escape key is located to the immediate right of the trackball.


Using the Application Menu

The application menu provides context-sensitive commands that let you perform various tasks in the application and take action on specific records. The following list contains a description of common menu items:

- **New:** Opens a blank detail page for the highlighted object so you can create a new record.
- **Open:** Opens the selected record.
- **Edit:** Lets you edit the selected record.
- **Advanced Search:** Opens the Advanced Search window, which lets you enter advanced search criteria to locate records.
- **Change View:** Opens the `Views` drop-down list so you can select a different view for the current page.
- **Manage Views:** Lets you manage custom views on your device. Custom views give you the ability to quickly filter and sort the Salesforce data on your device.
- **Place a Call:** Dials the phone number associated with the selected record.
- **Send Email:** Lets you send a message to the email address associated with the selected record.
- **Log a Call:** Displays the Log a Call page, which lets you create a completed task or event associated with the selected record.
- **Open Activities:** Displays the Open Activities related list for the selected record.
- **Activity History:** Opens the Activity History related list for the selected record.
- **Messages:** Opens the email application on your BlackBerry smartphone.
- **Preferences:** Opens the Preferences page so you can adjust the settings for each object.
- **System Info:** Opens the System Information page, where you can see view information about Salesforce Mobile Classic and perform maintenance tasks.
- **Log Out:** Logs you out of the mobile application.
- **Support:** Lists the contact information for your Salesforce administrator, if available.
- **About:** Displays the About Salesforce Mobile Classic page, where you can find the version number and build number of the client application installed on the device.

Your Mobile Data

Running Salesforce on a BlackBerry smartphone is much different than using the application on your computer. Wireless devices have a minimal amount of memory, a small screen, and do not maintain a constant network connection. To work with these limitations, a subset of your Salesforce data is stored in a local database on your phone. This ensures you have access to your most important records and lets you work offline when no network connection is available. Your Salesforce administrator defines which [tabs](#), [objects](#), and [records](#) are available to you in Salesforce Mobile Classic.

 **Note:** With Mobile Lite, your data set is not defined by your administrator. Instead, you have access to a few standard objects, and the only records that automatically synchronize to your device are ones that you have recently accessed in Salesforce.

IN THIS SECTION:

[Mobile Tabs](#)

[Mobile Objects](#)

[Mobile Records](#)

Mobile Tabs

The following types of tabs are available in the mobile application:

- [Standard and custom object tabs](#)
- [Dashboard tab](#)
- [Reports tab](#)
- [Web and Visualforce tabs](#)

By default, object tabs in the mobile application reflect Salesforce—if an object's tab is hidden in Salesforce, it is hidden in Salesforce Mobile Classic as well.

Your administrator must enable reports, dashboards, Visualforce tabs, and web tabs for the mobile application. If you cannot access tabs in Salesforce Mobile Classic that you frequently use in Salesforce, contact your Salesforce administrator.

SEE ALSO:

[Mobile Objects](#)

[Mobile Records](#)

Mobile Objects

Your mobile configuration determines which objects are available to you in Salesforce Mobile Classic. The mobile application supports all custom objects and the following standard objects:

- Accounts
- Assets
- Cases
- Contacts
- Events
- Leads
- Notes
- Opportunities
- Price Books
- Products
- Solutions

- [Tasks](#)

SEE ALSO:

[Mobile Records](#)

[Mobile Tabs](#)

Mobile Records

It is likely that you do not see all of your Salesforce records in Salesforce Mobile Classic. For each mobilized object, your administrator can create filter criteria to limit the amount of records on your device. For example, in a large organization, sending all open and closed opportunities to your BlackBerry smartphone could consume too much memory or potentially crash the device. Instead of sending all opportunities, your administrator might send only open opportunities that you own that are scheduled to close this month. Keep in mind that you can always [search for the records](#) that are not automatically downloaded to your device.

Periodically, your device [synchronizes with Salesforce](#) to download new and updated records.

Displaying Data

The tabs along the top of the Salesforce Mobile Classic window allow you to access data in the application. Selecting an object's tab displays a list of records for that object, which is called the list view. Keep in mind that the list view displays records stored locally on your device, not necessarily all of the object records available to you in Salesforce. To display an object's list view:

- Highlight the tab, and then press ENTER.
- With a trackball device, highlight the tab, and then click the trackball.
- With a trackwheel device, highlight the tab, click the trackwheel to open the menu, and then select **Open**.

In an object's list view:

- The header displays the object name with the total record count in parentheses.
- Filter records based on visible fields. Type *F* or select **Filter** from the main menu, then type at least one character and press ENTER to begin filtering. To clear the filter, press DEL until the text is deleted. If you can't find a record by filtering, try [searching](#) instead.
- You can [change the view](#) to display a different list of records.

Displaying Visualforce and Web Tabs

Not all tabs in Salesforce Mobile Classic are object tabs. If they were mobilized by your Salesforce administrator, Visualforce tabs and web tabs are also available.

A web tab displays a website. A Visualforce tab displays a page that was developed using Visualforce. Visualforce uses a tag-based markup language, providing a powerful way to build applications and customize the Salesforce user interface.

In Salesforce Mobile Classic, selecting a Visualforce tab or web tab launches a web browser that is embedded in the application. While the mobile client application lets you work with your object data offline, viewing websites and Visualforce pages requires a network connection.

- Select the Visualforce tab or web tab to display the page. How quickly the page loads depends on the strength of your wireless signal and the size of the page. Contact your administrator if the mobile browser does not properly display the page or if important features on the page are not supported.
- To return to the originating URL of a Visualforce tab or web tab, open the menu and select **Refresh**.

- Due to a limitation of the BlackBerry operating system, you should not run or refresh more than two web or Visualforce tabs at one time. If a Visualforce page or website stops loading because the maximum amount of web requests has been exceeded, wait a few moments and try again.
- To return to the Salesforce Mobile Classic home page, press Escape or select **Go to Home Page** from the menu.

Note the following BlackBerry requirements for Visualforce tabs and web tabs:

- The minimum BlackBerry operating system requirement for viewing Visualforce and web tabs is 4.3. To find out which operating system is installed on your BlackBerry smartphone, go to the BlackBerry home screen and select **Options > About**.
- All Visualforce pages contain JavaScript, and some web pages contain JavaScript. To view these pages on your BlackBerry smartphone, JavaScript must be enabled. Your BlackBerry administrator can globally enable JavaScript from the BlackBerry Enterprise Server. If your administrator did not enable JavaScript, you can enable it yourself by opening the BlackBerry browser, selecting **Options > Browser Configuration**, and then selecting the **Support JavaScript** checkbox.

Selecting Views

The `Views` drop-down list in the upper right corner of the page lets you select a different view. To change the view:

1. Highlight the currently selected option in the `Views` drop-down list. The default view on object tabs is All Records; the default view on the home page is Recent Items.
2. Open the `Views` drop-down list:
 - With a trackball device, click the trackball.
 - With a trackwheel device, click the trackwheel, and then select **Change Option**.
3. Select a view from the drop-down list. The following types of views are available:
 - **Standard Views:** The standard views are All Records and My Records. [Tasks](#) have two additional standard views.
 - **Custom Views:** You can create [custom views](#) in Salesforce Mobile Classic, or your administrator can set them up in Salesforce and push them to your device.
 - **Recent Items:** This view shows you the items you recently accessed on the tab.
 - **Search Results:** This view shows you the results of the last search you performed on the tab.
4. Press ENTER, or open the menu and select **OK**.

CHAPTER 3 Working with Records

Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

Salesforce Mobile Classic lets you work with the Salesforce data on your BlackBerry smartphone. You can view, edit, create, and delete records. You can also search Salesforce for specific records and add them to your device. Because Salesforce Mobile Classic is integrated with the BlackBerry smartphone, you can even export Salesforce records to BlackBerry applications, or import BlackBerry items to Salesforce.

- [Managing Records](#)
- [Searching for Records](#)
- [Using BlackBerry Features with Salesforce Mobile Classic](#)

IN THIS SECTION:

1. [Managing Records](#)
2. [Searching for Records](#)
3. [Using BlackBerry Features with Salesforce Mobile Classic](#)

Managing Records

Selecting an object's tab displays a list of all mobilized records for the object. With the required permissions, you can perform many different actions on records in the list view.

IN THIS SECTION:

- [Viewing Records](#)
- [Opening Records from Email Messages](#)
- [Viewing Related Lists](#)
- [Editing Records](#)
- [Creating Records](#)
- [Deleting Records](#)
- [Cloning Records](#)
- [Changing the Record Owner](#)
- [Using Notes](#)

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

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Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

Viewing Records

To view a record:

1. Highlight a record in the list view.
2. Open the record:
 - Press ENTER.
 - With a trackball device, click the trackball.
 - With a trackwheel device, click the trackwheel to open the menu, and then select **Open**.

Your Salesforce administrator can exclude unnecessary fields from the detail page in the mobile application. If the detail page lacks fields you frequently reference in Salesforce, contact your Salesforce administrator.

Opening Records from Email Messages

If you receive a message in the BlackBerry email application that contains a link to a Salesforce record, you can use the link to open the record in the mobile application. To open the record:

1. Open the email message.
2. Click the Salesforce link, then select **Open in Salesforce** from the menu.

If the record isn't available on your device, the mobile application prompts you to search for the record. If the object isn't mobilized, you can launch the BlackBerry browser to view the record in Salesforce. Keep in mind that record detail pages are not formatted for mobile devices, and they may not display correctly, particularly on devices running older BlackBerry operating systems.



Note: You can't open content records from links in your email messages.

Viewing Related Lists

In Salesforce Mobile Classic, you can access a record's related lists from the record detail page or the main menu. To view the related items from the record detail page:

1. Open a record.
2. Scroll down to the bottom of the detail page to view the Related Items section, which contains the record's related lists.
3. Select one of the related lists to display the records.

To view the related items using the main menu:

1. Open or highlight a record in the list view.
2. Open the menu. In the menu is a group of objects associated with the current record.
3. Select the type of related records you want to view.

If you do not see the record you need in the related list, you can quickly [search for more related items](#) using the Get More menu option.



Note: In Salesforce Mobile Classic, a record's related lists are based on the lookup fields in the object, not on the object's page layout. For example, you can remove the Accounts related list from the Contact page layout, but the Accounts related list still displays in contact records in Salesforce Mobile Classic because contact records contain a lookup field to Account. However, the Name related list must be added to the Task or Event page layout in order to view the full list of contacts, leads, and users and invitees in Salesforce Mobile Classic.

IN THIS SECTION:

[Searching for Related Items](#)

Searching for Related Items

You can optionally perform a search for a record's related items. To retrieve the related records:

1. Open a record, then open the menu and select a related list.
2. Click **Search server for more**.

The mobile application retrieves any related records from Salesforce and displays the search results.

3. To download a related item to your device, simply open the item. From the Search Results view, highlight the item and press ENTER or select **Open** from menu.
4. Press Escape to return to the search results and download additional related items.

The mobile application can't automatically download all the related items because a large amount of records could force the device to exceed the total data limit set by your Salesforce administrator.

Editing Records

To edit an existing record:

1. Highlight the record in the list view that you want to change. You can also open the detail page.
2. Open the menu and select **Edit**.
3. Make your changes to the record.
4. Select **Save** from the menu. If you want to cancel your changes without saving, select **Cancel** instead of **Save**.

Creating Records

To add a new record:

1. Open the list view for an object or highlight the tab.
2. Open the menu and select **New**.
3. Enter details in the empty fields making sure to enter information in the required fields.
4. Select **Save** from the menu.

When you create a new record in Salesforce Mobile Classic, it is saved on the device, marked as a temporary record, and sent to the server. The icon of the temporary record will appear slightly transparent, and the record cannot be edited or used in reference fields until it has been added to the Salesforce database. After your device receives notification that the record was accepted by Salesforce, it is usable like other records.

Deleting Records

To delete a record:

1. Open the record or highlight the record in the list view.
2. Open the menu and select **Delete**.
3. Click **Yes** in the confirmation window.

 **Warning:** Deleting a record in Salesforce Mobile Classic also deletes the record from Salesforce.

Cloning Records

The Clone option quickly creates a new record with the same information as the existing record. To clone a record:

1. Highlight the record in the list view that you want to change. You can also open the detail page.
2. Open the menu and select **Clone**.
3. Make your changes to the record.
4. Select **Save** from the menu.

Changing the Record Owner

You can change the ownership of a record in the mobile application. To change the record owner:

1. Open a record that includes an `Owner` field, such as a lead or opportunity.
2. Select **Change Owner** from the menu.
3. In the Select a User popup window, select the name of the user to whom you want to transfer record ownership.


You might only see your own name in the Select a User window. There are two ways to populate the window with other users' names:

- Download records—such as accounts or contacts—that belong to other users.
- [Perform an online search](#) for specific users.

Using Notes

You can create, view, and edit notes from the Notes related list for certain types of records, such as accounts, contacts, leads, opportunities, and products.

- To access the Notes related list, open a record, then select **Note** from the menu. You can also scroll to the bottom of the detail page and click **Note** in the Related Lists section.
- To view the contents of a note, click the name of the note.
- To edit a note, open it or highlight it in the Notes related list, then select **Edit** from the menu. Make the changes you want, then select **Save** from the menu.
- To create a note, open the Notes related list, then select **New** from the menu. Specify a description of the note and its contents, then select **Save** from the menu.

 **Note:** Notes are only available as a related list on your device if your Salesforce administrator added them to your mobile configuration. If you don't see notes in the mobile application and you normally access them online in Salesforce, contact your administrator to request a change to your mobile configuration.

Searching for Records

Salesforce Mobile Classic offers two ways to search for information: the [Search box](#) located below the tabs and [Advanced Search](#), which is accessible via a menu option. The Search box is a tool that lets you quickly search for records of a specific object type or across all

objects. Advanced Search allows you to restrict your search based on data in a single field or constrain the search to the related items of a specific record.

When you search for information in Salesforce Mobile Classic, the application looks for records stored locally on the device and for records online in Salesforce. The main differences between the two searches are outlined below:

Local Search:

- Triggered from the Search box.
- Searches all objects with tabs that have been mobilized and marked as searchable.
- Searches name fields, email fields, and phone fields, excluding fields that were not mobilized by the Salesforce administrator.
- A wildcard is automatically added to the beginning and end of your search string.

Online Search:

- Triggered from the Search box and Advanced Search.
- Searches all objects with tabs that have been mobilized and marked as searchable. Does not search products or solutions.
- Searches the same fields as the Sidebar Search in Salesforce. See “Search Fields” in the Salesforce online help for a complete list of the fields.
- A wildcard is automatically added to the end of your search string.

 **Note:** Without a wireless connection, Salesforce Mobile Classic cannot perform an online search.

IN THIS SECTION:

[Search Box](#)

[Advanced Search](#)

[Search Detail Pane](#)

Search Box

Searching for information from the Search box returns both local and online search results.

- Type keywords in the Search box at the top of the page.
 - To search across all objects, use the Search box on the Home tab.
 - To find only the records of a particular object, use the Search box on the relevant tab. For example, search for leads from the Leads tab.
- Click the **Search** icon or press ENTER. The **Search** icon switches to a **Cancel** icon, and the progress indicator below the Search box lets you know that the search is still running. Click the **Cancel** icon to stop the search.
- If you perform the search on the Home tab, the search results for each object display in collapsible sections. Click the section headers to open and close the containers. From any tab other than home, the search results display in a list. You do not have to wait for the search to stop running before drilling down into the search results.
- To obtain more information about an item in the search results, highlight the record to populate the [detail pane](#) at the bottom of the page. The detail pane layout is different for each object.
- With a record highlighted in the search results, you can use the **Send Email** and **Place a Call** menu options if the record contains phone and email fields.
- To open an item in the search results, highlight the record and select **Open** from the menu. If the record is online instead of local, it is automatically downloaded to your device when you open it. Records you retrieve through a search are flagged on the mobile

server and become part of your mobile data set. To remove these records from your device, open the [System Information page](#), select **Forget Search Results** from the menu, and then click **Yes**.

- You can access the last set of search results on a tab by selecting Search Results from the [Views drop-down list](#).

Advanced Search

The Advanced Search option in the main menu lets you search online for records and restrict your search based on data in a single field or constrain the search to the related items of a specific record.

1. From a tab, a record, or a related list, open the menu and select **Advanced Search**.
2. Enter your search string in the `Keyword` field.
3. The value in the `In` drop-down list defaults to the tab from which you initiated the search. You can select a different object.




Note: If you initiate the advanced search from a record, the name of the record appears next to the `Related To` checkbox. To constrain your search to the related items of the record, select the checkbox.

4. In the `Where` drop-down list, choose the field you will use as search criteria for the selected object. If you select a picklist field, the `Value` drop-down list appears below the `Condition` field so you can select the value.
5. In the `Condition` drop-down list, choose the operator that will be applied to your search string.
6. In the `Owner` drop-down list, select `Any` to locate records owned by any user, select your name to search within items you own, or select the name of another user.
7. Click **Search**.
 - The search results display in a list. The detail pane at the bottom of the page provides information about the items in the list; use the main menu to place a call or send an email if the highlighted record contains phone and email fields.
 - To open an item in the search results, highlight the record and select **Open** from the menu. The record is automatically downloaded to your device when you open it. Records you retrieve through a search are flagged on the mobile server and become part of your mobile data set. To remove these retrieved records from your device, open the [System Information page](#), select **Forget Search Results** from the menu, and then click **Yes**.

Search Detail Pane

Highlighting an item in the Search Results view populates the detail pane at the bottom of the page with limited information, and different fields display for each object. The following list describes the layout of each object's detail pane:

- **Account:** Billing City, Billing State, Website
- **Case:** Owner, Status
- **Case Comment:** Created By
- **Contact:** Mailing City, Mailing State, Email
- **Custom Object:** Email, Website
- **Event:** Description
- **Lead:** Mailing City, Mailing State, Email
- **Opportunity:** Owner, Stage
- **Price Book:** Description
- **Solution:** Status, Description
- **Task:** Description

 **Note:** You cannot customize the search detail pane layout.

Using BlackBerry Features with Salesforce Mobile Classic

Salesforce Mobile Classic integrates with several native BlackBerry applications, including email, phone, the address book, the calendar, and the browser. You can perform several actions on Salesforce records that launch BlackBerry applications.

IN THIS SECTION:

- [Placing Calls](#)
- [Sending Email](#)
- [Mapping an Address](#)
- [Importing Records](#)
- [Exporting Records](#)

Placing Calls

Salesforce Mobile Classic works with the phone application on your device, so you can place a phone call directly from any Salesforce record that includes a phone number field. The logging feature in the mobile application lets you create a task record from your device as soon as you complete the call. To make a call:

1. Open a record that contains a phone number field, such as a contact, lead, or account. You can also highlight the record in the list view.
2. Open the menu, and then select **Place a Call**.
If the record contains more than one phone number, a window opens so you can select the number you want to dial.
3. Highlight the phone number you want to dial, open the menu, and then choose **Select**.
The phone application dials the number. Upon ending the call, Salesforce Mobile Classic prompts you to [log the call](#), which is an optional step. Click **Yes** to log the call; click **No** to skip the logging process.

IN THIS SECTION:

- [Logging Calls](#)

Logging Calls

Salesforce Mobile Classic prompts you to log a call after placing it. Logging calls in the application is an effective way to keep track of your tasks while you are away from your desk.

- After ending a call you placed from Salesforce Mobile Classic, click **Yes** when the application prompts you to log the call. The [object preferences](#) control whether or not you are prompted to log the call.
- If you do not have time to log the call after it ends, highlight the record in the list view and select **Log a Call** from the menu.
- Logging a call launches a new task or event so you can enter details about the call. To define whether calls are logged as tasks or events, [edit the preferences](#).
- Open the menu and select **Save** to log the completed task to Salesforce. You can see the activity by viewing the activity history associated with the record.

Sending Email

Salesforce Mobile Classic is integrated with the native BlackBerry email application, making it easy to send emails to your Salesforce contacts or leads. You can optionally log the email immediately after you send it, which creates a new task or event. To send an email from a record:

1. Highlight a contact or lead record in the list view, or open the record.
2. Open the menu, and select **Send Email**.

If the **Send Email** option is not visible in the menu, it means that record in Salesforce Mobile Classic does not include an email address field. Contact your administrator if you need the `Email` field for that object added to your mobile configuration.

3. Compose your message.
4. Open the menu, and then select **Send**.

A popup window prompts you to [log the email](#), which is an optional step. Click **Yes** to log the email; click **No** to skip the logging process.

IN THIS SECTION:

[Logging Emails](#)

Logging Emails

By default, Salesforce Mobile Classic prompts you to log an email after sending it. Logging emails in the application is an effective way to keep track of your tasks while you are in the field.

- After sending an email from Salesforce Mobile Classic, click **Yes** when the application prompts you to log the email. The [object preferences](#) control whether or not you are prompted to log the email.
- Logging an email launches a new task or event. The `Subject` field defaults to the subject line of your email, and the body of your message is stored in the `Comments` field. The storage capacity for the text of logged emails is approximately 10,000 characters. If the email is larger than that, you can cancel the import or truncate the message. If you truncate the message in Salesforce, the original message in the BlackBerry email application is not affected.
- When you are done entering details about the email, open the menu and select **Save** to log the completed activity to Salesforce. You can see the activity by viewing the activity history associated with the record.

Mapping an Address

Salesforce Mobile Classic can help you find the location of a contact, account, or lead. To map an address:

1. Select a contact, lead, or account.
2. Make sure your phone is connected to the network, then open the menu and select **Map**. A popup displays when mapping an account's address so you can select either **Billing Address** or **Shipping Address**.

The browser launches Google Maps and displays the address.

3. To close the browser and return to the mobile application, press Escape on the BlackBerry smartphone.

 **Note:** The **Map** option is not available if your administrator excluded the address fields from your mobile configuration.

Importing Records

The integration between Salesforce Mobile Classic and your BlackBerry smartphone makes it possible to import records from BlackBerry applications to Salesforce.

IN THIS SECTION:

- [Importing BlackBerry Contacts to Salesforce](#)
- [Importing BlackBerry Events to the Salesforce Calendar](#)
- [Importing Emails from the BlackBerry Email Application](#)
- [Importing Calls from the BlackBerry Call Log](#)

Importing BlackBerry Contacts to Salesforce

Items in your BlackBerry address book are imported into Salesforce as contacts. To import a BlackBerry contact:

1. Open the BlackBerry address book on your device.
2. Highlight a BlackBerry contact.
3. Open the menu and select **Import to Salesforce**.

Salesforce Mobile Classic opens the New Contact page and imports some of the information from the BlackBerry address book. The following fields are automatically mapped to Salesforce:

- Name
- Salutation
- Title
- Department
- Phone
- Mobile Phone
- Fax
- Assistant Phone
- Email Address
- Account Name
- Mailing Address

4. Click **Save**.

Salesforce Mobile Classic sends the new contact record to Salesforce. It is marked as a temporary record, and you cannot edit the new record until Salesforce Mobile Classic receives acknowledgement that it was accepted by Salesforce.

Importing BlackBerry Events to the Salesforce Calendar

From Salesforce Mobile Classic, you can import your BlackBerry events to the Salesforce calendar. To import BlackBerry events:

1. Open the BlackBerry calendar.
2. Open or highlight an event, open the menu, and select **Import to Salesforce**. If Salesforce Mobile Classic is not currently open, selecting the **Import to Salesforce** option launches it.

The following BlackBerry event fields are automatically mapped to the Salesforce event:

- Subject
- Location
- Duration
- Start
- All Day Event
- Description
- Private

3. Enter additional information about the event, if necessary. For example, you can associate the event with a contact or opportunity.
4. Open the menu and select **Save**.

Importing Emails from the BlackBerry Email Application

Messages in the BlackBerry email application can be imported to Salesforce as completed tasks. The `Subject` field in Salesforce is automatically populated with the email's subject, and the body of the email message is stored in the `Comments` field. You can associate logged email messages with objects—like contacts and opportunities—before saving the information so that the tasks appear in Salesforce as activity history.

1. Open the BlackBerry email application and highlight the email you want to import into Salesforce. You can select a sent message or a received message.
2. Open the menu and select **Log Email to Salesforce**.
3. Enter information about the email.
4. Open the menu and select **Save**.

Salesforce Mobile Classic sends the information about the logged email to Salesforce. You can see the task by viewing the activity history associated with the record.

Importing Calls from the BlackBerry Call Log

After placing or receiving a call on your BlackBerry smartphone, you can log that call to Salesforce as a completed task. To log an inbound or outbound call:

1. Open the BlackBerry call log.
2. Highlight a phone number, open the menu, and select **Log Call to Salesforce**.
3. Enter information about the completed task or event. Be sure to associate the task with a record. Salesforce Mobile Classic cannot automatically populate this information because the call was placed or received outside of the mobile application.
4. Open the menu and select **Save**.

Exporting Records

The integration between Salesforce Mobile Classic and your BlackBerry smartphone makes it possible to export records from Salesforce to BlackBerry applications.

IN THIS SECTION:

[Exporting Salesforce Accounts and Contacts to the BlackBerry Address Book](#)

[Exporting Salesforce Events to the BlackBerry Calendar](#)

Exporting Salesforce Accounts and Contacts to the BlackBerry Address Book

Salesforce Mobile Classic can quickly export your Salesforce accounts and contacts to the BlackBerry address book, which saves time synchronizing Salesforce contacts with personal contacts. To export your Salesforce accounts and contacts:

1. In Salesforce Mobile Classic, open the list view for your contacts or accounts.
2. Highlight the record you want to export. You can also open the detail page.
3. Open the menu and select **Export to RIM**.

The following Salesforce account fields are automatically mapped to the BlackBerry contact:

- Name
- Phone
- Fax
- Billing Address

The following Salesforce contact fields are automatically mapped to the BlackBerry contact:

- Name
- Prefix
- Email
- Work Phone
- Mobile Phone
- Fax Phone
- Assistant Phone
- Title
- Company
- Mailing Address

4. Click **OK** to close the message window.



Tip: When you add a new contact to Salesforce Mobile Classic, you can select **Save and Export** in the menu to save the new record and export it automatically to the BlackBerry address book.

Exporting Salesforce Events to the BlackBerry Calendar

To export your Salesforce events to the BlackBerry calendar:

1. In Salesforce Mobile Classic, open the event calendar view or list view.
2. Highlight an event, open the menu, and select **Export to RIM**.

The following Salesforce event fields are automatically mapped to the BlackBerry calendar:

- Subject
- Location
- Duration
- Start
- All Day Event
- Description
- Private

3. Click **OK** to close the confirmation window.
The event is available in the BlackBerry calendar.

CHAPTER 4 Working with Standard Objects

Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

Generally, working with standard objects in the mobile application is similar to working with them in Salesforce. In some cases, you might need additional guidance to perform common tasks in the mobile application because the interface is different.

IN THIS SECTION:

1. [Converting Leads](#)
2. [Managing Activities](#)
3. [Using Cases and Solutions](#)
4. [Using Products and Price Books](#)

Converting Leads

Under certain situations, you can convert an existing lead into an account, and then convert it into an opportunity. However, to see the **Convert Lead** option in the menu for a lead record, your mobile configuration must include the `Status` and `IsConverted` fields in the Lead object. If you need these changes made to your mobile configuration, contact your Salesforce administrator. To convert a lead:

- Open a lead, and then select **Convert Lead** from the menu.
- After you convert the lead into an account, Salesforce Mobile Classic asks if you want to convert it into an opportunity; this behavior is similar to Salesforce.
- When you convert a lead to a new account or a new contact, the new record is saved with all the data from the lead, but the data cannot be edited until the new record has been accepted by Salesforce. However, when you convert a lead into an opportunity, Salesforce Mobile Classic prompts you for the name of the new opportunity.
- The conversion is not complete until the record is accepted by Salesforce and Salesforce Mobile Classic receives the record from Salesforce. Typically, the maximum delay is 20 minutes, assuming the device is connected and has a good network connection.

Managing Activities

Activities are both tasks and scheduled calendar events. In Salesforce Mobile Classic, there is not enough space on the home page to display your tasks and events; instead, you access your activities using the Tasks and Events tabs.

The activities available in the mobile application—whether open or history—are determined by the mobile configuration set up by your administrator. The date ranges are also controlled by your mobile configuration. Keep in mind, however, that you can perform a search to retrieve any open activities or activity history not currently available in the mobile application.

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later


IN THIS SECTION:





- [Viewing Tasks](#)
- [Viewing Events](#)
- [Activity Alerts](#)
- [Open Activities](#)
- [Activity History](#)

Viewing Tasks

- To view your tasks:
 - With a trackball device, highlight the Tasks tab, and then click the trackball.
 - With a trackwheel device, highlight the Tasks tab, click the trackwheel to open the menu, and then select **Open**.
 - Highlight the Tasks tab, and then press ENTER.
- The Tasks page lists your tasks in ascending order by due date. To change the sort order of your task list, [edit the object preferences](#).
- Depending on your mobile configuration, the task list might include only open tasks, or both closed and open tasks. You can perform a search to find tasks that are not available locally on your device.
- For each task in the list view, you can see the due date and the task's subject. At the top of the page in parentheses is the total number of tasks.
- The **views** drop-down list in the upper right corner allows you to change the view; you can select My Records, All Records, Open Tasks, or My Open Tasks.
 - **My Records:** Displays all open and closed tasks on the device that are assigned to you. Closed tasks only display if they have been mobilized by your Salesforce administrator.
 - **All Records:** Displays all open and closed tasks on the device, regardless of ownership. Closed tasks only display if they have been mobilized by your Salesforce administrator.
 - **Open Tasks:** Displays all open tasks on the device. This filtering option is only applicable if your mobile configuration includes closed tasks.
 - **My Open Tasks:** Displays all open tasks on the device that are assigned to you. This filtering option is only applicable if your mobile configuration includes closed tasks or tasks that are not assigned to you.
- To view the details of a task, highlight the task, and select **Open** from the menu. From the task's detail page, you can view, edit, or delete the record.

Viewing Events

- To view your events:
 - With a trackball device, highlight the Events tab, and then click the trackball.
 - With a trackwheel device, highlight the Events tab, click the trackwheel to open the menu, and then select **Open**.
 - Highlight the Events tab, and then press ENTER.
- The **views** drop-down list in the upper right corner of the page lets you choose whether to show all events on the device (All Records) or only events that are assigned to you (My Records).
- You can view the events in a calendar or list by clicking one of the icons along the top of the page:
 - The Daily icon () displays all of your calendar events for the day.

- The Weekly icon () displays all of your calendar events for the week.
 - The Monthly icon () displays all of your calendar events for the month.
 - The Next icon () jumps to the next day, week, or month, depending on the current calendar view.
 - The Previous icon () jumps to the previous day, week, or month, depending on the current calendar view.
- In the mobile application, you cannot view the details of an event without opening it. In any view, highlight the event, and select **Open** from the menu. From the event detail page, you can view, edit, or delete the record.

Activity Alerts

Salesforce Mobile Classic can display popup reminders for upcoming tasks and events. The alert opens in a small notification window when you are logged in to the mobile application.

- When you see the Activity Notification window, open the menu and click **Select** to view the first record. You can ignore the alert and press Escape to continue working.
- If Salesforce Mobile Classic displays more than one record in the notification window, highlight the alert you want to view, and choose **Select** from the menu. Press the Escape button to re-open the notification window and choose other alerts.
- When you are done looking at the alerts in the notification window, press the Escape button to close it.
- You can enable activity alerts by [editing the object preferences](#).

Open Activities

For a particular record, you can view open activities, which are activities that have yet to occur or have not been completed. To view open activities:

1. Highlight an account, contact, lead, opportunity, or case in the list view, or open the detail page.
2. Open the menu and select **Open Activities**.

If no open activities exist for the record, or if the open activities have not been mobilized, no activities display. If you do not see the record you want, you can [search for records](#) in Salesforce and download them to your device.

Activity History

The Activity History related list of a record displays all completed tasks, logged phone calls, expired events, and emails for the record and its associated records. Salesforce Mobile Classic can show activity history for accounts, contacts, leads, opportunities, and cases. To view the activity history:

1. Highlight an account, contact, lead, opportunity, or case record in the list view, or open the detail page.
2. Open the menu and select **Activity History**.

If no closed activities exist for the record, or if closed activities have not been mobilized by your administrator, no activities display. You can [search for Salesforce records](#) that are not available in the mobile application.

3. To view the details of a closed activity, highlight the record, and then press ENTER or select **Open** from the menu.

Using Cases and Solutions

When you save a new case to track an issue, Salesforce Mobile Classic stores it in the local database and sends it to Salesforce. Once the record is accepted by Salesforce, the case number is assigned and the record is updated in the mobile application.

IN THIS SECTION:

[Displaying Cases and Solutions](#)

[Case Assignment Rules](#)

[Solving Cases](#)

[Case Comments and History](#)

Displaying Cases and Solutions

The related lists for cases and solutions are available from the application's main menu when you are viewing either a case or solution record.

To display a case's solutions:

1. Select the Cases tab.
2. Open a case.
3. Open the menu and select **Solutions**.

If no solutions have been attached to the case, or if the related solutions are not available in the mobile application, then Salesforce Mobile Classic displays an empty list. Depending on your Salesforce permissions, you may be able to create a new solution.

To display the cases attached to a solution:

1. Select the Solutions tab.
2. Open a solution.
3. Open the menu and select **Cases**.

Case Assignment Rules

You can configure Salesforce Mobile Classic to assign new cases based on the assignment rules defined in Salesforce. In the case preferences, the default value of the `Assign with Active Assignment Rule` is `Ask Me`, which means that Salesforce Mobile Classic prompts you for the case assignment when you save a new case. You can configure the assignment rule settings by [editing the case preferences](#).

Solving Cases

To solve a case:

1. Open a case.
2. Open the menu and select **Attach Solution**.

Salesforce Mobile Classic displays a list of existing solutions. If you do not see the solution you need, you might need to [perform a search](#) to retrieve the record from Salesforce.

3. Select one of the solutions in the list, and then choose **Select** from the menu.

Salesforce Mobile Classic attaches the solution to the case, and it is available in the related list of solutions for the case.

To remove a solution from a case:

1. Open a case.
2. Open the menu and select **Delete Association**.
Salesforce Mobile Classic displays a list of solutions attached to the case.
3. Highlight one of the solutions in the list, and then click **Select** in the menu.
4. Click **Yes** to confirm that you want to remove the solution from the case.

Case Comments and History

If your administrator mobilized the case comment and case history objects, the **Case Comment** and **Case History** menu options are available in Salesforce Mobile Classic when you view cases. You can display the comments for a case, and you can see the history of fields that have changed for the record.

Using Products and Price Books

Products are the individual items that you sell on your opportunities. In the mobile application, you can add products to opportunities and change the price book for an opportunity.



Note: Products and price books are not available in Mobile Lite, which is the free version of Salesforce Mobile Classic.

IN THIS SECTION:

- [Adding Products to Opportunities](#)
- [Changing the Price Book for a Product](#)

Adding Products to Opportunities

To add a new product to an opportunity:

1. Open an opportunity.
2. Open the menu and select **Opportunity Product**.
Salesforce Mobile Classic displays a list of opportunity products. If no products have been associated with the opportunity, the list page is empty.
3. Select **New** from the menu.
4. Select the price book for the opportunity.
5. Enter the information for the new opportunity product:
 - **Opportunity:** Defaults to the current opportunity, but you can change it to a different opportunity record.
 - **Product:** Choose a product from the selected price book.
 - **Sales Price** and **Quantity:** Enter these values, and the value for the **Total Price** field is calculated automatically when the record is submitted to Salesforce.
6. Open the menu and select **Save**.

Changing the Price Book for a Product

Changing the price book for an opportunity deletes existing opportunity product records from the opportunity.

1. Open an opportunity's detail page.
2. Open the menu and click **Change Price Book**.
3. Click **Yes** in the confirmation window to acknowledge you want to delete existing products from the opportunity.
4. Select the new price book to associate the price book with the opportunity.

CHAPTER 5 Working with Dashboards and Reports

Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

Dashboards and reports are powerful tools in Salesforce that let you view snapshots of your data. Both features are available in the mobile application.

IN THIS SECTION:

1. [Working with Dashboards](#)
2. [Running Reports](#)

Working with Dashboards

Mobile dashboards let you keep up with corporate metrics and key performance indicators even when you are away from your desk. Your Salesforce administrator defines whether the Dashboards tab is available in the mobile application.

The minimum BlackBerry operating system requirement for mobile dashboards is 4.5. Mobile dashboards are compatible with versions 4.2 and 4.3, but tables in the dashboards might not display properly. To find out which operating system is installed on your BlackBerry smartphone, go to the BlackBerry home screen, and then select **Options > About**.

IN THIS SECTION:

- [Displaying Dashboards](#)
- [Refreshing Dashboards](#)

Displaying Dashboards

Selecting the Dashboards tab displays the dashboard you most recently viewed. If this is your first visit to the Dashboards tab in Salesforce Mobile Classic, the mobile application requests the dashboard you last viewed in Salesforce. Depending on the strength of the cellular or WiFi signal, it could take several minutes before the dashboard displays on the page.

To view a different dashboard, choose a dashboard from the **View Dashboard** drop-down list, and then click **Go**. This drop-down list includes dashboards in all dashboard folders to which you have access.

Note the following about mobile dashboards:

- Mobile dashboards display in a single column.
- Links to custom report details are disabled in mobile dashboards.
- Dashboards do not automatically refresh in the mobile application, but you can [manually refresh them](#).

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

- The mobile application lets you work offline. Without a wireless connection, you can see the last viewed dashboard, but you cannot refresh the dashboard or select a different one.

Refreshing Dashboards

Due to the limitations of older BlackBerry browsers, dashboards cannot automatically refresh in the mobile application. The data in each dashboard is as current as the date and time displayed in the **As of** field at the top of the dashboard. To refresh the dashboard:

1. Click the **Refresh** button.
2. Wait a few minutes to give the mobile application time to receive the updated information from Salesforce. You can leave the dashboard and perform other functions in Salesforce Mobile Classic while the data refreshes.
3. Return to the dashboard and click **Reload**.

Running Reports

If your administrator enables reports for the mobile application, some reports are automatically available in the mobile application. You can also download and run any custom reports you have access to in Salesforce. While you can run reports on your device, you cannot edit, delete, or create them.




Unlike Salesforce, Salesforce Mobile Classic stores the data for the five most recently run reports. You can choose to view these cached reports or refresh them. The benefit of storing reports on the mobile device is that you can access some data even when you are not in wireless coverage.

IN THIS SECTION:

- [Reports Home](#)
- [Searching for Reports](#)
- [Running Reports](#)
- [Viewing Reports](#)
- [Refreshing Reports](#)
- [Clearing Report Data](#)

Reports Home

Highlight the Reports tab and select **Open** from the menu to display the reports home page.

- The reports list view displays the names of your reports in alphabetical order. The reports mobilized on your device are pulled from the Mobile Reports folder in Salesforce.
- The icon next to the report name indicates the availability of the report data:
 - The Remote Report icon () indicates that no cached version of the report is stored on the device.
 - The Pending Report icon () indicates that the report is running.
 - The Local Report icon () indicates that the report contains data and is available for viewing.
- Just like in any list view, you can filter the report list by typing a text string.

- The detail pane at the bottom of the reports home page displays information about the highlighted report. You can see the name of the folder where each report is stored in Salesforce. For cached reports, the detail pane also displays the date and time the report was run.
- To remove a report from your reports list, click the report and select **Remove From Device** from the menu.

Searching for Reports

You can download custom reports from Salesforce that are not on your device. To search for a custom report:

1. Type part of the report name in the search box on the reports home page.
2. Click the **Search** icon.

Any custom reports matching the search string are delivered to your device. Note that the Search Results view is not available on the reports home page.

Running Reports


To run a report in the mobile application:

1. Open the reports home page.
2. Click a report name, and then select **Run Report** from the menu.


If the **Run Report** option is replaced by the **Refresh Report** option, a copy of the report is already cached on the device.

You must be in wireless coverage to run or refresh a mobile report. If no network connection is available, the report is queued and will run when a connection is established.

3. The device requests the report from the server. The report icon is flagged with a clock while the report is running. The mobile server retrieves the report data, and a notification window appears when you can [view the report](#).

 **Note:** The information you see in reports is only the data to which you have access. This information includes records that you own, records to which you have read or read/write access, records that have been shared with you, records owned by or shared with users in roles below you in the hierarchy, and records for which you have “Read” permissions.


If your report is more than 128 KB, the server will not deliver the report to your device, and you will receive a warning message.

 **Note:** You can view only those fields that are visible in your page layout and field-level security settings. (Field-level security is available in Enterprise, Unlimited, Performance, and Developer Editions.)

Viewing Reports

To open a report on your mobile device, click **Yes** in the message window when you are notified that the report is available. If you choose to view the report later, you can highlight the report name in the list view and select **View Report** from the menu.

- The mobile report viewer displays the report in a basic table. The report header shows the report name and the date it was received from the server. The viewer does not support sorting, summaries, subtotals, or grouping.
- With trackball navigation, you can use the trackball to scroll through the report horizontally and vertically. With the trackwheel, scrolling moves the focus from left to right; hold down ALT as you scroll with the trackwheel to move the focus down one row at a time. The ALT key will only scroll vertically after you move the focus out of the header row.
- The header row of the report is frozen so you can always see the column labels. The row above the header displays the full text of the selected cell, which is helpful when the cell's content has been truncated. You can also highlight a cell and select **Show Cell** from the menu to display the content in a pop-up window.

 **Note:** To enhance the experience of viewing reports on a wireless device, you might want to create mobile versions of important or useful reports in Salesforce that have less columns and additional filtering criteria.

Refreshing Reports

Salesforce Mobile Classic stores the last five reports you ran on the mobile device. Cached reports are flagged with a full-color report icon; reports with no cached data have grayscale icons. You can view a cached report or request an updated version. To refresh a report:


- From the reports home page, highlight a cached report and select **Refresh Report** from the menu. The device requests the report from the server. The server retrieves the updated report data, and a notification window appears when it arrives on the device.
- From a report, select **Refresh Report** from the menu. The device requests an update from the server, closes the report, and displays the reports home page.

Clearing Report Data

Salesforce Mobile Classic stores the data for the five most recently run reports. To delete the version of a report stored on your mobile device:


1. Open the reports home page.
2. Highlight a cached report and select **Clear Report** from the menu. The device clears the stored copy of the report. Clearing report data does not remove the report from the reports home page.

CHAPTER 6 Using Salesforce CRM Content in Salesforce Mobile Classic

 **Important:** As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

The Content tab lets you share content with customers and colleagues directly from the mobile application. The Content tab displays the content records that are automatically synchronized to your device. While the content record information is synchronized, the actual files associated with the content records are not. This lets you deliver content from the mobile application even when a file is too large to be downloaded to your device.

To display content records, open the Content tab. You can't search for content records on the Content tab. You also can't view a list of your subscribed content in the mobile application or filter the list of records based on a particular workspace. If you need a content record that isn't synchronized to your device, contact your Salesforce administrator and request an adjustment to your mobile configuration.

 **Note:** The Content tab is only visible if Salesforce CRM Content is enabled for your organization and your Salesforce administrator made it available in the mobile application. Mobile Lite, the free version of the mobile application, does not support Salesforce CRM Content.

IN THIS SECTION:

1. [Viewing Content Details](#)
2. [Previewing Content](#)
3. [Delivering Content](#)

Viewing Content Details

To view information about a file, click a file name in the Content tab to open the content detail page. The **Preview Content** option is available on the content detail page depending on the type of content you are viewing and your permissions. You can't preview some file types.

In the mobile application, you can't download a file to your device, upload a new version of the file, or subscribe to a content record.

Previewing Content

You can preview content before delivering it, but your device must have a wireless connection. To preview content:

1. Open a content record, then select **Preview Content** from the menu.
2. Open the menu and click **Preview Content**.

The preview page opens in a temporary tab called Preview Content.

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

- For PowerPoint files, the preview page displays a viewer that lets you navigate between the slides in the presentation.
 - For other file types, the preview page displays the first page of the content.
 - Some file types, like .exe files, can't be previewed.
3. Open the menu and click **Close Browser** when you're finished previewing the content, or click the **Send** button to deliver the content.

Delivering Content

Delivering content in the mobile application sends the content's encrypted URL to any recipient, such as leads, customers, partners, and colleagues. To deliver content:

1. Open a content record, then select **Preview Content** from the menu.
The preview page opens in a temporary tab called Preview Content.
2. Click the **Send** button.
3. Click **Send Email**.
4. Open the menu and click **Add To:**
5. Select a recipient:
 - Click **Contact** to select a Salesforce contact.
 - Click **Lead** to select a prospect you entered in Salesforce.
 - Click **User** to select a co-worker that uses Salesforce.
 - Click **Enter a New Address** to manually type the email address.
 - Click **Look Up Address Book** to select a recipient from your BlackBerry address book.
6. Optionally add carbon copy email addresses by opening the menu and selecting **Add Cc:** or **Add Bcc:**.
Your email address is automatically added to the Cc field when you create the content delivery.
7. Optionally personalize the subject and body of the message. Don't edit the delivery URL.
8. Open the menu and click **Send**.
9. Open the menu and click **Close Browser** to close the preview page and return to the Content tab.

CHAPTER 7 Customizing Salesforce Mobile Classic

Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

The mobile application lets you customize each of the object tabs by creating custom views and editing object preferences.

IN THIS SECTION:

1. [Managing Mobile Custom Views](#)
2. [Editing Object Preferences](#)

Managing Mobile Custom Views

A custom list view gives you the ability to change how Salesforce Mobile Classic displays records for a standard or custom Salesforce object. A custom view defines which fields are displayed, and the order in which fields are displayed and sorted.

IN THIS SECTION:

- [Creating Custom Views](#)
- [Editing Custom Views](#)
- [Deleting Custom Views](#)

Creating Custom Views

You can create personalized custom views to see a specific set of records in the mobile application. For example, you can create a custom view for high revenue opportunities or accounts in a specific state or industry. Note that the views you create in Salesforce Mobile Classic are not available in Salesforce.

When you create a custom view on your device, that view is stored separately from your Salesforce data. If you reload your data or upgrade Salesforce Mobile Classic to a new version, the custom views you defined on the device are still available.

1. Highlight a tab.
2. Open the menu and select **Manage Views**.
3. Open the menu and select **New**.
4. In the `View Name` field, enter a name that describes the custom view, such as "CA Accounts" or "High Revenue Opportunities."
5. In the Object drop-down list, select the object for the custom view.
6. The Display Columns section lets you define what data is displayed in the custom view.
 - In the Column 1 drop-down list, select the data for the first column.

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

- If you want the custom view to have two columns, select the data for the second column in the Column 2 drop-down list.
7. The Display Order section lets you enter sort criteria for the custom view.
 - In the Sort Field picklist, select the field by which you want to sort the view.
 - In the Order picklist, select *Ascending* or *Descending*.
 - Complete the second set of fields to add another sort condition.
 8. The View Filters section lets you define up to five statements that select specific data for the custom view from the local database.
 - Select *All Conditions* or *Any Conditions* in the Match drop-down list if you create more than one condition. This sets the and/or parameters for the filters you define.
 - Click the **Add Condition** button.
 - In the Where drop-down list, select a field in the object.
 - In the Is drop-down list, select an operator that will perform an action on your entry in the *Value* field.
 - In the Value field, type or select the value for the condition. Salesforce Mobile Classic uses the operator you selected to compare the filter's object field to this value.
 - Optionally click the **Add Condition** button to enter additional statements in the available fields. To delete a condition, highlight the filter and select **Remove Condition** from the menu.
 9. Open the menu and select **Save**.



Warning: If changes are made to an object field on Salesforce that you used in your custom view, your custom view will stop working. You must edit the fields in your custom view to match your Salesforce fields.

Editing Custom Views

To edit a custom view you created in the mobile application:

1. Highlight a tab.
2. Open the menu and select **Manage Views**.
The Manage Custom Views page displays existing custom views.
3. Highlight a custom view, open the menu, and select **Edit**.
You cannot edit the mobile views created by your Salesforce administrator.
4. Edit the view's settings.
5. Open the menu, and then select **Save**.

Deleting Custom Views

To delete a custom view you created in the mobile application:

1. Highlight a tab.
2. Open the menu and select **Manage Views**.
The Manage Custom Views page displays existing custom views.
3. Highlight a custom view, open the menu, and select **Delete**.
You cannot delete mobile views created by your Salesforce administrator.

4. Click **Delete** in the confirmation window.
5. Click **OK** to close the message window.

Editing Object Preferences

You can change some of the properties for your objects in Salesforce Mobile Classic. You can configure the sorting options for all objects, while some objects also offer additional settings such as display options, alert notifications, and logging options.

To change the configuration for an object:

1. Highlight any tab, open the menu, and select **Preferences**.
2. Highlight the `select` drop-down list and choose **Change Option** from the menu to choose the object whose preferences you want to change.
3. Edit the settings on the Options page.
4. Open the menu and select **Save**.

IN THIS SECTION:

[Task Preferences](#)

[Event Preferences](#)

[Account Preferences](#)

[Contact Preferences](#)

[Lead Preferences](#)

[Opportunity, Price Book, Product, Solution, and Custom Object Preferences](#)

[Case Preferences](#)

[Call and Email Preferences](#)

Task Preferences

The task options let you change the order of tasks in the list view, enable alerts on your device so you are reminded about upcoming tasks, and determine which application's tasks are available from the tasks page in Salesforce Mobile Classic.

- **Sort Order:** Select `Ascending` to display your tasks in ascending order, starting with the most recent. Select `Descending` to display your tasks in descending order, ending with the most recent. Note that your administrator probably did not mobilize all of your Salesforce tasks. You might only see tasks for the next two weeks, for example.
- **Enable Alerts:** Select `Yes` to enable reminders for upcoming tasks. Select `No` to disable task alerts.
- **Display Pop-Ups for Alerts:** If you enabled alerts, select `Yes` to display an alert notification for your daily tasks. Select `No` if you prefer to be alerted without a popup window. You can change the reminder method using the `Alert Type` field.
- **Alert Type:** If you enabled task reminders, you can change the way the BlackBerry alerts you about your daily tasks. The alert options are `Silent`, `Vibrate`, `Tune`, and `Vibrate and Tune`.
- **Alert Time:** Set the time you want to be alerted about your daily tasks. All task reminders for the day display at once. Select any hour between 6:00 A.M. and 10:00 P.M.
- **Task App Selection:** Select `Salesforce Mobile Classic Tasks` to access your Salesforce tasks from the Tasks tab. Select `RIM Tasks` if you want the Tasks tab in Salesforce Mobile Classic to launch the BlackBerry Tasks application. You can no longer view your Salesforce task records from the Tasks tab if you change the option to `RIM Tasks`.

Event Preferences

The event options let you change the order of the events in the list view, enable alerts on your device so that you're reminded about upcoming calendar events, and determine which application's events are available from the events page in Salesforce Mobile Classic.

- **Sort Order:** Select **Ascending** to display your event list view in ascending order, starting with the most recent. Select **Descending** to display your events in descending order, ending with the most recent. Note that your administrator probably did not mobilize all of your Salesforce events. You might only see events for the next two weeks, for example.
- **Enable Alerts:** Select **Yes** to enable reminders for upcoming events. Select **No** to disable event alerts.
- **Display Pop-Ups for Alerts:** If you enabled alerts, select **Yes** to display an alert notification for your events. Select **No** if you prefer to be alerted without a popup window. You can change the reminder method using the **Alert Type** option.
- **Alert Type:** If you enabled event reminders, you can change the way the BlackBerry alerts you about your events. The alert options are **Silent**, **Vibrate**, **Tune**, and **Vibrate and Tune**.
- **Advance Notice:** Specify the amount of time before the event that you want the reminder to appear.
- **All-Day Events Alert At:** Specify the time of day that you want to be alerted about your all-day events.
- **Calendar App Selection:** Select **Salesforce Mobile Classic Calendar** to access your Salesforce events from the Events tab. Select **RIM Calendar** if you want the Events tab in Salesforce Mobile Classic to launch the BlackBerry Calendar application. You can no longer view your Salesforce event records from the Events tab if you change the option to **RIM Calendar**.

Account Preferences

The account options let you change the order of the records in your account list and control how you are prompted to log information to Salesforce after making a call from an account record.

- **Sort Order:** Select **Ascending** to display your accounts in alphabetical order, from A to Z. Select **Descending** to display your accounts in reverse alphabetical order, from Z to A.
- **Log After Call:** Select **Yes** if you want Salesforce Mobile Classic to automatically create a new task or event after placing a call from an account record. Select **Ask Me** if the application should display a popup window so you can specify whether you want to log the call. Select **No** if you never want to be prompted to log calls for accounts.

Contact Preferences

The contact options let you change the order of the records in your contacts list, change the format of your contacts' names in the list view, and control how you are prompted to log information to Salesforce after making a call or sending an email from a contact record.

- **Sort Order:** Select **Ascending** to display your contacts in alphabetical order, from A to Z. Select **Descending** to display your contacts in reverse alphabetical order, from Z to A.
- **Display As:** Select the format for contact names in list view. You can choose between **Firstname Lastname** and **Lastname, Firstname**.
- **Log After Email:** Select **Yes** if you want Salesforce Mobile Classic to automatically create a new task or event after sending an email from a contact record. Select **Ask Me** if the application should display a popup window so you can specify whether you want to log the email. Select **No** if you never want to be prompted to log emails for contacts.
- **Log After Call:** Select **Yes** if you want Salesforce Mobile Classic to automatically create a new task or event after placing a call from a contact record. Select **Ask Me** if the application should display a popup window so you can specify whether you want to log the call. Select **No** if you never want to be prompted to log calls for contacts.

Lead Preferences

The lead options let you change the order of the records in your leads list, change the format of your leads' names in the list view, control how you are prompted to log information to Salesforce after making a call or sending an email from a lead record, and enable alerts on your device so that you are reminded about new leads.

- **Sort Order:** Select **Ascending** to display your leads in alphabetical order, from A to Z. Select **Descending** to display your leads in reverse alphabetical order, from Z to A.
- **Display As:** Select the format for lead names in list view. You can choose between **Firstname Lastname** and **Lastname, Firstname**.
- **Log After Email:** Select **Yes** if you want Salesforce Mobile Classic to automatically create a new task or event after sending an email from a lead record. Select **Ask Me** if the application should display a popup window so you can specify whether you want to log the email. Select **No** if you never want to be prompted to log email for leads.
- **Log After Call:** Select **Yes** if you want Salesforce Mobile Classic to automatically create a new task or event after placing a call from a lead record. Select **Ask Me** if the application should display a popup window so you can specify whether you want to log the call. Select **No** if you never want to be prompted to log calls for leads.
- **Notify on New Leads:** Select **Yes** if you want Salesforce Mobile Classic to notify you when a new lead record has been sent to your device. Select **No** if you do not want to be alerted about new leads.
- **Display Pop-Ups for Alerts:** If you enabled alerts, set to **Yes** to display an alert notification for your new leads. Set to **No** if you prefer to be alerted without a popup window. You can change the reminder method.
- **Alert Type:** If you enabled lead notifications, you can change the way the BlackBerry alerts you about new leads. The alert options are **Silent**, **Vibrate**, **Tune**, and **Vibrate and Tune**.
- **Assign with Active Assignment Rule:** Select **Yes** to configure Salesforce Mobile Classic to automatically assign new leads based on the assignment rules set up in Salesforce. Select **Ask Me** to force the application to prompt you about using the active assignment rule for a new lead. Select **No** if you do not want to use assignment rules.

Opportunity, Price Book, Product, Solution, and Custom Object Preferences

The sort option on the Options page lets you change the order of the records in your list view.

- **Sort Order:** Select **Ascending** to display your records in ascending order. Select **Descending** to display your records in descending order.

Case Preferences

Case preferences let you change the sort order and the set assignment rule.

- **Sort Order:** Select **Ascending** to display your cases in ascending order. Select **Descending** to display your cases in descending order.
- **Assign with Active Assignment Rule:** Select **Yes** to configure Salesforce Mobile Classic to automatically assign new cases based on the assignment rules set up in Salesforce. Select **Ask Me** to force the application to prompt you about using the active assignment rule for a new case. Select **No** if you don't want to use assignment rules.

Call and Email Preferences

The call and email options let you decide how you want to log completed activities.

- **Log Call as:** Select **Task** to configure Salesforce Mobile Classic to automatically log completed calls as tasks. Select **Event** to automatically log completed calls as events. Select **Ask Me** to force the application to prompt you whether you want to log the completed call as a task or an event.
- **Log Email as:** Select **Task** to configure Salesforce Mobile Classic to automatically log sent emails as tasks. Select **Event** to automatically log emails as events. Select **Ask Me** to force the application to prompt you whether you want to log the sent email as a task or an event.

CHAPTER 8 Managing the Application

Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

In Salesforce Mobile Classic, you can view application information and perform several routine maintenance tasks.

IN THIS SECTION:

1. [The System Information Page](#)
2. [The System Information Menu](#)
3. [Refreshing Data](#)
4. [Upgrading Salesforce Mobile Classic](#)
5. [Upgrading the BlackBerry Operating System](#)
6. [Removing Salesforce Data from Your Device](#)
7. [Uninstalling Salesforce Mobile Classic](#)

The System Information Page

The System Information page displays information about the mobile user, the device, the network connection, and the local database of Salesforce records.

- To access the System Information page, select **System Info** from the menu.
- The page has collapsible sections, each containing a set of information. To open a collapsible section, highlight the header and click the trackwheel or trackball.
- The following list describes the System Information page sections:
 - **Header:** Lists your Salesforce user name, last login time, device PIN, connection status, and the application lockout time. The Application Lockout Time is an administrative setting that controls how much time can pass before the application locks you out due to inactivity. While you can see the setting on the System Information page, you cannot modify it.
 - **System Information:** Lists the version number of Salesforce Mobile Classic installed on the device, the battery strength, radio strength, and other information about your connection to the transport and database.
 - **Support Info:** Lists the contact information for your Salesforce administrator, if available.
 - **Scheduler:** Provides the scheduler status and lets you know the next time the device will poll Salesforce for new data and updates.
 - **Transport Diagnostics:** Contains information about the transport, which transfers data between the mobile client application and Salesforce.
 - **Database Info:** Displays all the database tables that exist on the device and shows how many records are in each table.

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

The System Information Menu

The menu on the System Information page contains options that let you perform routine maintenance tasks and manage the application. The following list contains a brief description of each System information menu item:

- **Close:** Closes the System Information page.
- **Refresh System Info:** Refreshes the data on the System Information page.
- **Forget Search Results:** Clears all records downloaded from Salesforce through online searches.
- **Refresh All Data:** Causes the application to synchronize the data on your device with Salesforce.
- **Log Out:** Logs you out of the mobile application.
- **Network AutoConfig:** Cycles through the BlackBerry Internet Service and BlackBerry Enterprise Server connection modes until a network connection can be established. Only use this option if you are having connection issues with your BlackBerry smartphone.
- **Support Command:** Opens a command line where you can enter support commands. Only use this option if you are instructed to do so by Salesforce Support.
- **Deactivate User:** Removes all the Salesforce records from the BlackBerry smartphone, while leaving the mobile client application on the device.
- **Upgrade:** Upgrades to the latest version of the Salesforce Mobile Classic.
- **Uninstall:** Uninstalls the Salesforce Mobile Classic application from the device.
- **Help:** Opens the System Information help page.
- **Hide:** Hides the Salesforce Mobile Classic application. Hiding the application does not log you out.
- **About:** Displays the About Salesforce Mobile Classic page, where you can find the version number and build number of the client application installed on the device.

Refreshing Data

Changes you make in Salesforce Mobile Classic are transmitted to Salesforce, and updates made in Salesforce are sent to your device. However, these updates do not happen immediately due to scheduled processing time and wireless connection delays. Typically, data synchronization occurs every twenty minutes. To force Salesforce Mobile Classic to update your data, you can use the **Refresh All Data** option.


1. Navigate to the System Information page.
2. Open the menu, and then select **Refresh All Data**.

Salesforce Mobile Classic displays a message indicating that a full data update request was sent to the server. All records on your device will be updated. Keep in mind that this process may take a while depending on how many changes have been made to your data.

Upgrading Salesforce Mobile Classic


You can upgrade to the latest version of Salesforce Mobile Classic by installing the new client application on your device.

1. In the mobile application, open the menu and select **System Info**.
2. Open the menu and select **Upgrade**.
3. Click **Download**.
4. Click **Yes** to replace the old version of the application.

 **Note:** If your device is running version 9.0 or earlier, you must first remove the old version of the client application before continuing with the installation. From the BlackBerry home screen, click **Options** > **Salesforce Mobile Classic**, then click **Uninstall Application**.

5. Click **Reboot** to restart your device.
6. When prompted to allow an HTTP connection, select the `tp.mobile.salesforce.com` checkbox. Scroll down and click **Allow this connection**.
7. Click the Salesforce Mobile Classic icon, which resides on the home page of your device or in the Applications folder. On newer phones, the icon may be in the Downloads folder.
8. Read the license agreement and click **I Accept**.

The mobile application opens. Account activation is not required for upgrades.

 **Note:** If you are upgrading from an older version of the mobile application, you may have to activate your Salesforce account on the device after the upgrade. Accept the license agreement, enter your username and password, and wait for your records to download from Salesforce.

Upgrading the BlackBerry Operating System

The Salesforce Mobile Classic app can run on BlackBerry operating system versions 4.3 through 7.0. Even if your device meets the minimum operating system requirement, you can improve its performance by upgrading to the latest version of the operating system offered by your cellular carrier.

If your BlackBerry smartphone is integrated with a BlackBerry Enterprise Server or BlackBerry Professional Software, your IT department may have plans for updating your smartphone's software. Contact your administrator prior to upgrading.

To upgrade the BlackBerry operating system on your smartphone:


1. Visit the [official list of cellular carriers](#) on the BlackBerry website.
2. Click the link for your carrier under the appropriate region.
3. Follow the instructions to download and install the latest version of the BlackBerry Desktop Software.

You must upgrade the desktop software before upgrading the device software. The version of the BlackBerry Desktop Software must match the operating system version you want to install on your device. For example, to upgrade your device to version 4.5 of the BlackBerry operating system, install version 4.5 of the BlackBerry Desktop Software.

4. Connect your device to your computer.
5. Launch the BlackBerry Desktop Software.
6. Back up your device's data.
7. Upgrade the operating system. For specific instructions, see the [BlackBerry Desktop Software product documentation](#).

Removing Salesforce Data from Your Device

When you deactivate your account, you remove the Salesforce data from your device, while leaving the mobile client application on the device. After the data is erased and you log into Salesforce Mobile Classic again, a clean set of data is downloaded from the mobile server.

 **Warning:** You must deactivate your account if your Salesforce username changes, or if you receive a device from your administrator that someone else in your organization has already activated.

1. Navigate to the System Information page.
2. Open the menu, and then select **Deactivate User**.
3. Click **Yes** in the confirmation window.

Your data is removed from the device. When the process is complete, Salesforce Mobile Classic displays the activation page so you can submit your Salesforce username and password to download a new set of data.

Uninstalling Salesforce Mobile Classic

The mobile client application and your Salesforce data can be removed from your device using the Uninstall option from the System Information page.

1. Navigate to the System Information page.
2. Open the menu, and then select **Uninstall**.
3. Click the **Yes** button in the confirmation window. You can click **No** if you change your mind.

The application files are removed. This process could take a few minutes. After you reinsert the battery, Salesforce Mobile Classic is no longer on the device.

CHAPTER 9 Frequently Asked Questions

Important: As of Summer '14, the Salesforce Mobile Classic for BlackBerry app is no longer supported. You can continue to use the app, but Salesforce no longer provides support in the form of bug fixes or enhancements for any issues you may encounter. Talk to your Salesforce administrator about migrating to the Salesforce1 app, the new Salesforce mobile experience.

- Why don't I see all of my Salesforce records on the device?
- Why isn't the data exchange between Salesforce and my device instantaneous?
- Why does the battery on my BlackBerry smartphone drain faster with Salesforce Mobile Classic installed?
- How can I tell which version of Salesforce Mobile Classic is on my device?
- How do I upgrade to the latest version of Salesforce Mobile Classic?
- How do I remove Salesforce Mobile Classic from my device?
- Why won't my BlackBerry smartphone connect to the server?
- I can't install Salesforce Mobile Classic due to lack of space on my device. What can I do?
- I can't download the application because I get an error message saying I'm using a desktop browser instead of a mobile browser. What can I do?
- Why can't I log in to Salesforce Mobile Classic?
- Why did my BlackBerry browser icon disappear?
- How is Salesforce data secured on my BlackBerry smartphone?

Why don't I see all of my Salesforce records on the device?

The space limitations and usability restrictions of wireless devices make it necessary to send a subset of your Salesforce data to the device. Salesforce Mobile Classic provides a powerful and configurable method to filter data.

The data selected is determined by the mobile configuration assigned to your user account in the Mobile Administration Console. Mobile configurations are sets of parameters that determine the data Salesforce transmits to users' mobile devices, and which users receive that data on their mobile devices. The configuration can be edited by your Salesforce administrator at any time to change the data you receive.

Once every 24 hours, Salesforce Mobile Classic requests a full update of your data set. The filters contained in your mobile configuration are executed to rebuild the data set, and the resulting data records are sent to your device.

The mobile client application checks for data changes every twenty minutes. During this incremental update, the server retrieves any newly created records from Salesforce that you own, and then sends that data to the device. Modifications to any records already resident on your device are also retrieved. The client application adjusts its incremental polling time based on application usage. If the application is not in use, the polling time interval increases in an exponential fashion, until it reaches eight hours. From that point forward, the device polls for data changes every eight hours instead of twenty minutes. This prevents the mobile application from draining the device battery when the application is rarely used.

The incremental data update may retrieve some records that do not match the filter conditions of your mobile configuration. In this case, these records only exist on your device until the next full update, which occurs every 24 hours.

EDITIONS

Salesforce Mobile Classic setup available in: both Salesforce Classic and Lightning Experience

Mobile app available in: **Performance, Unlimited,** and **Developer** Editions for orgs created prior to Winter '17

Mobile app available for an extra cost in: **Professional** and **Enterprise** Editions for orgs created prior to May 1, 2016

Mobile app not available for orgs created in Winter '17 or later

Why isn't the data exchange between Salesforce and my device instantaneous?

Unlike Salesforce, which is an on-demand browser application, Salesforce Mobile Classic is a client application you install and run on your BlackBerry smartphone. There are several reasons why you cannot run the Salesforce on-demand application on your BlackBerry smartphone:

- **Connection:** Mobile devices do not maintain a constant network connection. With a client application, you can work offline and still have uninterrupted access to your Salesforce data.
- **Speed:** Wireless data networks are still very slow. Client applications are highly responsive.
- **Browser Limitations:** Most mobile browsers cannot support JavaScript and Flash. Generally, Salesforce pages contain too much data, and they simply do not load in mobile browsers.

For most mobile users, the data from Salesforce is transmitted to your device very quickly. If your device has a low wireless signal, you may experience a delay in receiving new data.

You will experience a slight delay before Salesforce Mobile Classic uploads data to Salesforce. If the mobile application uploaded data every instant you made a change, the battery power of your BlackBerry smartphone would drop fast.

Why does the battery on my BlackBerry smartphone drain faster with Salesforce Mobile Classic installed?

The mobile client application communicates with Salesforce on a periodic basis. This communication results in radio and other activity, which increases battery usage. The battery charge expectancy varies considerably between devices, carriers and networks. The following are tips which should help you get the most out of your battery:


- Do not let the battery completely discharge; plug it in whenever you have the opportunity.
- Keep your Bluetooth turned off when it's not in use.
- Quit instant messaging software when not in use instead of running the processes in foreground. Also, stay logged off the networks that you do not use often.
- Make sure you keep the backlight turned off or low whenever possible.
- Upgrade to latest version of the BlackBerry operating system and keep it up-to-date with the operating system patches and fixes in the core modules.

How can I tell which version of Salesforce Mobile Classic is on my device?

From the Salesforce Mobile Classic home page, open the menu and click **About**. The About Salesforce Mobile Classic page displays the version number.

How do I upgrade to the latest version of Salesforce Mobile Classic?

You can upgrade to the latest version of Salesforce Mobile Classic by downloading and installing the new client application on your device. For detailed instructions, see [Upgrading Salesforce Mobile Classic](#) on page 42.

 **Note:** If your device is managed by a BlackBerry administrator on the BlackBerry Enterprise Server, you may receive upgrades automatically.

How do I remove Salesforce Mobile Classic from my device?

The mobile client application can be removed from your device by running the uninstall program from the System Information page.

- Access the System Information page, open the menu, and then select **Uninstall**.
- Click the **Yes** button in the confirmation window.

Why won't my BlackBerry smartphone connect to the server?

Confirm that the wireless radio of your device is turned on. On the device home page, find the wireless icon, usually located at the bottom of the menu. If the icon is off, turn it on.

If your wireless radio is on, you might have a problem with the firewall. On your BlackBerry smartphone, navigate to **Options > Firewall** or **Options > Security Options > Firewall** to locate the device firewall settings. Make sure the firewall is enabled, and then click the trackwheel or trackball and select **Reset Settings**. Wait several seconds and then reset the device. If you see the

Frequently Asked Questions

message, "The application salesforce_transport_<mds, bibs, tcp> has requested an http connection to tp.mobile.salesforce," select the `tp.mobile.salesforce.com` checkbox and then scroll down and click **Allow this connection**.

I can't install Salesforce Mobile Classic due to lack of space on my device. What can I do?

If you do not have enough memory on your BlackBerry smartphone to install the application, you must clear unnecessary data. You can recover space on your device by deleting old emails or transferring large items, such as music and image files, to an external memory card.

To find out how much free memory is available on your device, select **Options > Status** and look at the value in the `File Free` field.


I can't download the application because I get an error message saying I'm using a desktop browser instead of a mobile browser. What can I do?

When you navigate to `mobile.salesforce.com`, the browser sends Salesforce information about the type of device attempting to connect so that you can download the correct client application for your phone. In some versions of the BlackBerry operating system, the browser can be configured as a desktop browser or BlackBerry browser. If the browser is configured as a desktop browser, Salesforce cannot determine what type of device is requesting the client download.

To find out how your BlackBerry browser is configured:

1. Open the browser on your BlackBerry smartphone.
2. Open the menu, click **Options**, then click **General Properties**.
3. Note the value in the `Default Browser` field. The value should be Internet Browser or BlackBerry Browser.
4. Press the Escape button to return to the Browser Options screen, then click **Browser Configuration**.
5. Scroll down to the `Emulation Mode` field. If the value in the field is not set to BlackBerry, Salesforce cannot determine what type of device is requesting the client download.

There are two ways to resolve this issue:

- Navigate to `http://mobile.salesforce.com/bb` to download the BlackBerry client application.
 -  **Note:** If you are upgrading from a version of the client application older than 9.0, navigate to `http://mobile.salesforce.com/console/loader/`.
- Change the browser settings to BlackBerry and navigate to the standard download URL, which is `mobile.salesforce.com`.

Why can't I log in to Salesforce Mobile Classic?

The mobile client application is designed to handle all combinations of password resets and expirations. However, in rare cases, it is possible that you are unable to log in to Salesforce Mobile Classic after a password expiration; you are presented with several prompts to enter both your old and new passwords, but you continuously receive messages that your login is invalid.

The easiest way to resolve this issue is to reactivate your mobile account. In the mobile application, open the main menu and select **System Info**, then open the menu and select **Deactivate User**. Click **Yes** to delete the data on the device. After the data is erased, enter your Salesforce username and your current password. Select **Activate** from the menu.

Why did my BlackBerry browser icon disappear?

If your BlackBerry browser icon disappears, this may be a sign that your Mobile Data Services (MDS) has been disabled. Contact your BlackBerry system administrator for help.

How is Salesforce data secured on my BlackBerry smartphone?

Although your BlackBerry smartphone transmits data over the air very securely, it does not securely store data on the phone unless you enable content protection. To enable content protection, go to **Options > Security** and set `Content Protection` to **Enabled**. This requires you to set a password.

After enabling content protection, your BlackBerry smartphone encrypts sensitive data, including emails, browser cache, address book entries, and Salesforce Mobile Classic data. This prevents someone with physical access to your device from connecting it to a PC and extracting sensitive information.

Frequently Asked Questions

When you lock your BlackBerry smartphone, it begins encrypting data. The initial encryption may take quite some time. While the BlackBerry is encrypting data, an open padlock icon displays. When it is finished encrypting data, the padlock icon closes.

INDEX

A

Accounts

- logging calls [17](#)
- mapping an address [18](#)
- placing calls [17](#)
- preferences [38](#)
- sending email [18](#)

Activities

- alerts [25](#)
- logging calls [17](#)
- logging emails [18](#), [20](#)
- overview [23](#)
- viewing activity history [25](#)
- viewing open activities [25](#)

Activity reminders [25](#)

Advanced search [16](#)

Alerts [25](#)

Application lockout time [41](#)

B

BlackBerry

- integration with Salesforce [17](#)
- operating system [43](#)
- requirements [3](#)

BlackBerry address book

- exporting contacts to Salesforce [19](#)
- importing accounts from Salesforce [21](#)
- importing contacts from Salesforce [21](#)

BlackBerry calendar

- importing events to Salesforce [19](#)
- importing Salesforce events [21](#)

BlackBerry call log

- logging calls to Salesforce [20](#)

BlackBerry Email

- logging to Salesforce [20](#)

C

Calendar

- viewing events [24](#)

Cases

- assignment rule [39](#)
- assignment rules [26](#)
- comments and history [27](#)
- detaching solutions [26](#)
- preferences [39](#)

Cases (*continued*)

- solving [26](#)

Cellular connection [3](#)

Cloning records [14](#)

Contacts

- logging calls [17](#)
- logging emails [18](#)
- mapping an address [18](#)
- placing calls [17](#)
- preferences [38](#)
- sending email [18](#)

Content

- about [33](#)
- deliver [34](#)
- preview [33](#)
- viewing details [33](#)

Creating

- custom views [35](#)
- notes [14](#)
- passcodes [5](#)
- records [13](#)

Custom objects

- preferences [39](#)

Custom views

- creating [35](#)
- deleting [36](#)
- editing [36](#)
- troubleshooting [45](#)

D

Dashboards [29](#)

Data set [7](#)

Deactivating users [43](#)

Deleting

- custom views [36](#)
- records [13](#)
- Salesforce data from the device [43](#)

Delivering content [34](#)

Devices

- battery life [45](#)

E

Editing

- custom views [36](#)
- notes [14](#)
- object preferences [37](#)

Index

Editing (*continued*)

- price books for products 28
- records 13

Email

- importing from BlackBerry to Salesforce 20
- logging 18
- opening records from 12
- preferences 39
- sending from records 18

Events

- preferences 38
- viewing 24

Exporting

- accounts to BlackBerry address book 21
- contacts to BlackBerry address book 21
- Salesforce events 21

Exporting records 20

F

Filtering 9

I

Importing

- BlackBerry contacts 19
- BlackBerry events 19
- email from the BlackBerry smartphone 20

Importing records 19

Installing Salesforce Mobile Classic 5

L

Leads

- assignment rule 39
- converting 23
- logging calls 17
- logging emails 18
- mapping an address 18
- placing calls 17
- preferences 39
- sending email 18

List views 9

Logging

- calls 17
- emails 18

Logging in 6

M

Maps 18

Menu 7

Mobile

- data 7
- objects 8
- tabs 8

N

Navigating 6

Notes 14

O

Object preferences 37

Objects 8

Opening

- records from email 12

Operating system 43

Opportunities

- adding products 27
- preferences 39

Overview

- activities 23
- reports 30
- Salesforce Mobile Classic 1

P

Passcode 5

Phone calls

- logging 17
- placing 17
- preferences 39

Preferences

- accounts 38
- calls 39
- cases 39
- contacts 38
- custom objects 39
- email 39
- events 38
- leads 39
- opportunities 39
- price books 39
- products 39
- solutions 39
- tasks 37

Previewing content 33

Price books

- changing 28
- preferences 39

Products

- adding products to opportunities 27

Products (*continued*)
 changing price books 28
 preferences 39

R

Recent items 10
Records
 changing ownership 14
 cloning 14
 converting leads 23
 creating 13
 data set 9
 deleting 13
 editing 13
 exporting 20
 importing 19
 logging calls 17
 logging emails 18
 placing calls 17
 searching 14
 sending email 18
 viewing 12
Refreshing data 42
Related lists
 searching 13
Reports
 clearing data 32
 home page 30
 overview 30
 refreshing 32
 running 31
 searching 31
 viewing 31

S

Salesforce Mobile Classic
 customizing 35
 data 7
 free version 1
 installing 5
 integration with BlackBerry applications 17
 logging in 6
 menu 7
 navigating 6
 overview 1
 removing Salesforce data 43
 requirements 2
 synchronizing with Salesforce 42
 system information 41

Salesforce Mobile Classic (*continued*)
 troubleshooting 45
 uninstalling 44
 upgrading 42

Search results 10
Searching
 advanced search 16
 detail pane 16
 for records 14
 for related items 13
 search box 15
Solutions
 preferences 39
System information
 menu 42
 page 41

T

Tabs 8
Tasks
 preferences 37
 viewing 24

U

Uninstalling Salesforce Mobile Classic 44
Upgrading
 BlackBerry operating system 43
 Salesforce Mobile Classic 42

V

Viewing
 activity history 25
 content details 33
 events 24
 list views 9
 notes 14
 open activities 25
 records 12
 related lists 12
 reports 31
 system information 41
 tasks 24
Views 10
Visualforce tabs 9

W

Web tabs 9
Wireless connectivity 3